



CMS

Case Management System Reference

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Login Screen



The screenshot shows a login interface for the Maryland Commission on Civil Rights Case Management System. At the top, there is a logo featuring the Maryland state flag and the text "MARYLAND Commission on Civil Rights Case Management System". Below the logo, there are two input fields: "Username" with the text "keith.witte" and "Password" with a masked password "*****". A "LOGIN" button is located at the bottom of the form.

Username	keith.witte
Password	*****
LOGIN	

This is the first screen you will see. Login using your assigned username and password to gain access to the system.

Main Menu



After a successful Login, you will be brought to the Main Menu. From here, cases can be accessed, the Report Generator and System Maintenance functions.

Case Load Screen

Case Management System

☐ Group By User

☐ Show Open Cases Only

Logged in as: keith.witte

Look Up

add a new case

Back to Main Menu

Refresh

View Mediators

View Representatives

View Respondents

Help

ID	Date	Assigned To	Status	Type	Charge Age	Office Age	Staff Age	MCCR Number	EEOC/HUD Number	CP Last Name	CP First Name	Respondent	Action
20	10/07/2014	paulette.keefer	Open	E	334	362	36		531-2013-01931	Jones	Allen	Sears Roebuck & Co.- Annapolis	<div>EditDelete</div>
21	06/24/2014	alesha.bell	Aborted	E		28	0			Longueira	Juan	Picca Pollo a la brasa	<div>EditDelete</div>
23	05/28/2014	phillip.wikes	Closed	H	113	106	84	1405-0157	03-14-0219-8	Smith	Nathaniel & Car	Wells Fargo Bank, N.A.	<div>EditDelete</div>
24	05/28/2014	phillip.wikes	Closed	E	288	288	21		531-2013-02288C	Carpenter	David	Saint Joseph Medical Center	<div>EditDelete</div>
25	05/28/2014	lindsey.moran	Closed	E		347	132	1310-0559	12F-2013-00647	Jensen	Shirley	Fairfield Properties, LLC	<div>EditDelete</div>
26	05/28/2014	lindsey.moran	Closed	E	586	586	41	1211-0559	12F-2013-00021	Reisman	Patricia	Anne Arundel County Board of Elections	<div>EditDelete</div>
27	05/28/2014	phillip.wikes	Closed	P	3564	3619	2	0408-0527		Phillips	Marilyn	Stoner, Preston & Boswell, Chartered	<div>EditDelete</div>
28	05/28/2014	phillip.wikes	Closed	P	3564	3619	2	0408-0528		Phillips	Marilynn	Dulany Leahy Curtis & Beach LLP	<div>EditDelete</div>
29	05/28/2014	phillip.wikes	Open	P	3730	3785	168	0408-0530		Phillips	Marilynn	Hollman, Maguire, Titus & Korzenewski, C	<div>EditDelete</div>
30	05/28/2014	phillip.wikes	Open	P	3730	3787	168	0408-0533		Phillips	Marilynn	Law Office of Frank D. Coleman	<div>EditDelete</div>
31	05/28/2014	phillip.wikes	Open	P	3730	3787	168	0408-0534		Phillips	Marilynn	Clifford B. Silbiger & Associates	<div>EditDelete</div>
32	05/28/2014	phillip.wikes	Open	P	3722	3785	168	0409-0542		Phillips	Marilynn	Denova Joint Venture	<div>EditDelete</div>
33	05/28/2014	phillip.wikes	Open	P	3722	3785	168	0409-0543		Phillips	Marilynn	Ulsch, McFaul Saunders & Wright, P.A.	<div>EditDelete</div>
34	05/28/2014	phillip.wikes	Open	E	622	649	168	1302-0125	12F-2013-00274	Purdie	Darryl	Long Fence and Home	<div>EditDelete</div>
35	05/29/2014	phillip.wikes	Closed	E	91	119	19	1403-0100	12F-2014-00203	Jones	Anita	Parnes, May, McKay, Lee & Associates	<div>EditDelete</div>
36	05/29/2014	phillip.wikes	Closed	E	79	101	22	1404-0116	12F-2014-00248	Dombrosky	Thomas	JD Byrider	<div>EditDelete</div>
37	05/29/2014	phillip.wikes	Closed	E	355	355	89		531-2013-02320	Hazelwood	Ione	MTA	<div>EditDelete</div>

After selecting Add/View Cases, you will be brought to the Case Load Screen. Here is where you will see your entire case load. Notice that all of your cases are shown. To limit the view to only cases that are open, check the box in the upper-left corner for Show Open Cases Only. If you are a Supervisor, you will see all of your unit's cases. You may check the box for Group By User to see the cases arranged by Investigator.

The Case Load screen is designed to use alternating blue and yellow colors for easy reading. The lines highlighted in Red are Threshold Banded. Once a case exceeds an age limit the band will appear. The three different ages that can be seen from this screen are: Case, Office and Staff.

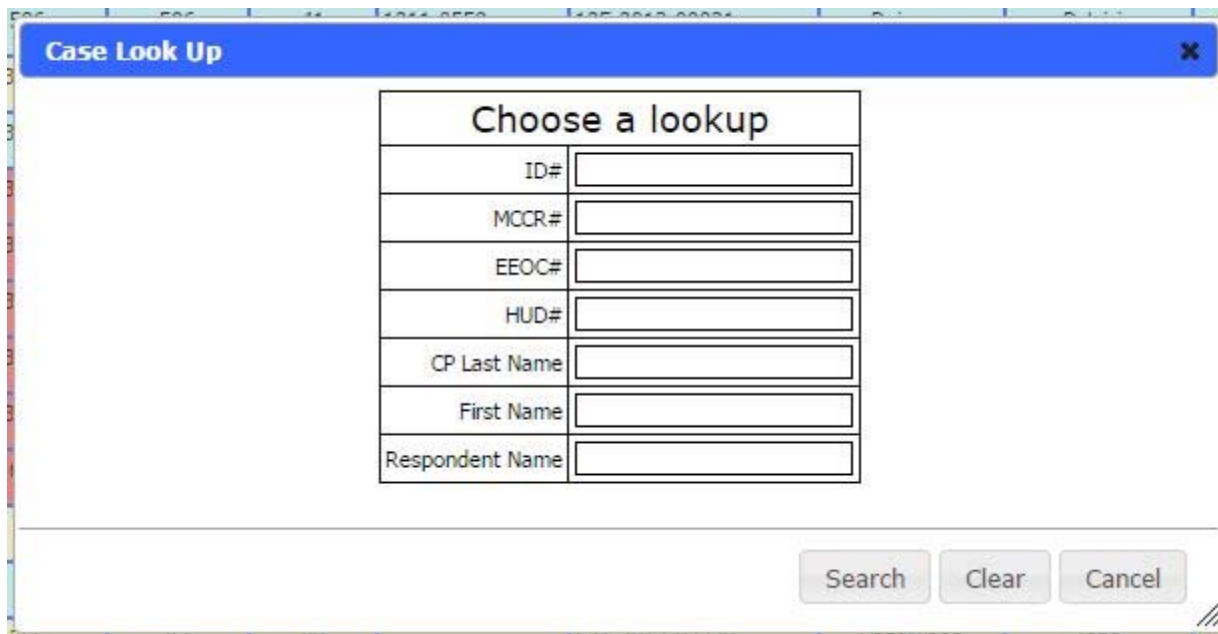
Charge Age is determined by when the case was Authorized.

Office Age is determined by when the case was received in our Office.

Staff Age is determined by when the case was assigned to you.

You may also select the option to see all cases. You will notice that the Action buttons available to you will change depending upon if the case is in your case load or not. You may edit only your or your staff's cases, all others will only have a View button.

Look Up Case

A screenshot of a software dialog box titled "Case Look Up" with a blue header bar and a close button (X) in the top right corner. The main area contains a table titled "Choose a lookup" with eight rows, each with a label and a text input field. The labels are ID#, MCCR#, EEOC#, HUD#, CP Last Name, First Name, and Respondent Name. At the bottom right of the dialog are three buttons: "Search", "Clear", and "Cancel".

Choose a lookup	
ID#	<input type="text"/>
MCCR#	<input type="text"/>
EEOC#	<input type="text"/>
HUD#	<input type="text"/>
CP Last Name	<input type="text"/>
First Name	<input type="text"/>
Respondent Name	<input type="text"/>

Search Clear Cancel

A case may be searched for using any of the fields listed above.

Add a New Case

Add New Case

ID:	Initial Entry by: Witte, R. Keith		on 11/12/2014 11:49 AM	Last Updated by: Witte, R. Keith		on 11/12/2014 11:49 AM
-----	-----------------------------------	--	------------------------	----------------------------------	--	------------------------

Office Date	Violation Date	MOCR#	Case Type	--Select--
FY 2015	Violation Occurred in --Select--	EEOC#	Referral Type	--Select--
Date Authorized	Case Status Open	HUD#	Function	Unit

Current Assignment as of Last Action Action Date

Basis

Race: American Indian/Alaska Native, Asian, Bi-Racial/Multi-Racial, Black/African American

Sex: Female, Male, Transgender

Religion: 7th Day Adventist, Catholic, Jewish, Muslim

National Origin, Age, Marital Status

Hint: hold down the Ctrl key to select multiple items or uncheck items.

Issues

Issues: Accessibility, Assignment, Constructive Discharge, Demotion

Housing

Hint: hold down the Ctrl key to select multiple items or uncheck items.

CP

Last Name, First Name, Middle Name, Salutation --Select--

Address Line 1, Address Line 2

City, State, Zip, County --Select--

Home Phone, Cell Phone

Email, Agree to None, Reason

Representative Search

RP

Respondent Name Search

Respondent Address

Contact Name, Title, Contact Phone, Contact Email

Address Line 1, Address Line 2

City, State, Zip, County

Agree to None, Reason

Representative Search

Add Help Cancel

Click the Add New Case button to be presented with a blank case screen. CMS will automatically assign a new ID number for the case. Fill in as much information as known. Notice that the only buttons shown on the bottom of the screen are Add, Help and Cancel. This is because the case record must first be saved before information on the buttons can be added. Once the case appears in Case Load screen, the buttons will be available for use. This screen contains three Search buttons. The Representatives and Respondents are kept in a separate list and to add them to the case they have to be selected from the list. Note: Always search the list to see if the Respondent/Representative exist before adding them as new. This is so data consistency can be maintained for reporting purposes.

View Mediators

Manage Mediators

Search:

Last Name	First Name	City	State	Work Phone	Email Address	Action
Allen	Caulton	Fort Washington	MD		caulton.allen@comcast.net	<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Cases Mediated"/>
Allen	Caulton	Fort Washington	MD		caulton.allen@comcast.net	<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Cases Mediated"/>
Kyle	Don	Columbia	MD		dakhd@comcast.net	<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Cases Mediated"/>
Mediator	Test	Any City	MD		testmediator@email.com	<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Cases Mediated"/>
Mediator	Test	Any City	MD		testmediator@email.com	<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Cases Mediated"/>
Mediator	Test	AnyCity	ME		test.mediator@email.com	<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Cases Mediated"/>
Palmisano	Kate	Annapolis	MD		kcullenmediator@aol.com	<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Cases Mediated"/>
Rheubottom	Lori	Spencerville	MD	301-362-2019	rheubott@msn.com	<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Cases Mediated"/>
Seiden	Bernice	Baltimore	MD		seiden.bernice@gmail.com	<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Cases Mediated"/>
Williams	Anita	Montgomery Village	MD	240-777-3139	anita_b_williams@yahoo.com	<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Cases Mediated"/>

Page: 1

When clicking the View Mediators button on the Case Load Screen or when adding a mediation using the Mediation Button, the above screen will be shown. Using this screen mediators may be added, modified or viewed. Be sure to check the list to see if a mediator exists before adding them as new. For example, the first two mediators listed above are the same person. By clicking on the Cases Mediated button you can see what cases this mediator has been involved with. In the example of the duplication of line 1 and line 2, you would have to click on both lines to see all the cases mediated.

When adding a mediator, you will see this screen.

The image shows a software window titled "Edit Record" with a blue header bar and a close button (X) in the top right corner. The window contains a form with the following fields and values:

- First Name: Caulton
- Middle Name: .
- Last Name: Allen
- Email Address: caulton.allen@comcast.net
- Address: 6220 Joe Klutch Drive
- City: Fort Washington
- State: Maryland (dropdown menu)
- Zip: 20744
- County: (empty dropdown menu)
- Home Phone: 202-359-1759
- Work Phone: (empty text box)
- Fax Number: (empty text box)
- Cell Phone: (empty text box)
- Service Date Name: (empty text box)
- Rating: A (dropdown menu)
- Willing To Mediate At: (checkbox checked) Baltimore (text box)

At the bottom right of the window, there are four buttons: "Training", "Save", "Help", and "Cancel".

For each mediator, you can also see what training they have attended

The screenshot shows a web-based application with a main window titled "Edit Record" and a smaller, overlapping window titled "Training".

Edit Record Window:

- First Name: Caulton
- Middle Name: .
- Last Name: Allen
- Email Address: caulton.allen@comcast.net
- Service Date Name: (empty field)
- Rating: A
- Willing To Mediate At: ☒ Online

Training Window:

- Mediator: Allen, Caulton**
- Table with 2 columns: Date, Class
- Text: No training classes entered.
- Form fields: Date (empty), Class (dropdown menu showing "=="Select==" with a downward arrow), and an "Add" button.
- Buttons: "Help" and "Close" at the bottom right.

Main Window Buttons: "Training", "Save", "Help", and "Cancel" are located at the bottom right of the "Edit Record" window.

View Representatives

Manage Representatives							
Search: <input type="text"/> <input type="button" value="Go"/>							
<input type="button" value="add record"/> <input type="button" value="Back"/> <input type="button" value="Help"/>							
Firm Name	Last Name	First Name	City	State	Email	Phone	Action
	Parsley	Luciene	Baltimore	Md		410-727-6352	<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
	Baron	Stehpanie	Baltimore	MD			<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
							<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
		Rouhana					<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
	Travanty	Constance		DC			<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
1st Class Moving Storage	Boussi	Hassan	Orlando	FL		407-674-5599	<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
Alan Lescht & Associates, PC	McDonough	Sara	Washington	DC		202-463-6036	<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
Allegany County Historical Society	Slonake	Evan	Cumberland	MD		410-514-7601	<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
Alperstein & Diener, P.A.,	Glickson	Melanie	Baltimore	MD	mlg@alpersteinlaw.com	443-550-1298	<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
American Legion Morris Frock Post 42	Poole, Adjuntant	Kevin	Hagerstown	MD		301-733-7676	<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
another firm name	another L name	another F name	a firm city	CA	anotherfirm@email.com		<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
Baldwin & Briscoe, P.C.	Brewster	Joshua	Lexington Park	MD	jbrewster@baldwinbriscoe.com	301-862-4400	<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
Baldwin Law Group, LLP	Case	Vera	Baltimore	MD	vcase@blglaw.org	410-828-5510	<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
Balt City Public Schools Office of Legal Counsel	Turner	Tammy	Baltimore	MD		410-396-8542	<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
Baltimore City Law Department	Gilkey	Gary	Baltimore	MD	100 N. Holliday Street, Suite 101	410-396-3960	<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
Baxter Enterprises, Inc.	Resto, HR Mgr.	Margot	Salisbury	MD		410-572-6031	<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
BEIN, AXELROD, P.C.	Markey	Regina	Washington	DC		202-328-7222	<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
Berenson LLP	Lobasso	Peter	Great Falls	VA	pnl@berensonllp.com	703-759-1055	<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
Bertucci's	Handren, Risk and Be	Scott	Northborough	MA		508-351-2576	<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>


When clicking the View Representatives button on the Case Load Screen, the above screen will be shown. Using this screen representatives may be added, modified or viewed. Be sure to check the list to see if a representative exists before adding them as new.

By clicking on the Show Activity button you can see what cases this representative has been involved with.

Activity										
CP Name	Date FFC Scheduled	CP Rep	FFC CP Rep	RP Rep	FFC RP Rep	Date of FFC	Investigator Assigned	Monetary Award	Resolution	
Oshodi, Halima	07/22/2014	Alperstein & Diener, P.A.,					Commey, Atto	\$0.00		View
Oridedi, Quadri	07/24/2014	Alperstein & Diener, P.A.,					Commey, Atto	\$0.00		View

HelpClose

When adding a representative, you will see this screen.

Edit Record 

Respondent Name:

Waste Management, Inc.

Address 1:

7175 Kit Kat Rd

Address 2:

City:

Elkridge

State:

MD

Zip:

21075

County:

Howard ▼

Contact Name:

Michele H. Molly

Title:

Senior Legal Counsel

Contact Phone:

215-269-2188

Contact Email:

Contact Add 1:

100 Brandywine Boulevard, St.

Contact Add 2:

Contact City:

Newton

Contact State:

PA

Contact Zip:

18940

Contact County:

▼

Notes:

Save

Help


Cancel

View Respondents

Manage Respondents						
Search: <input type="text"/> <input type="button" value="Go"/>						
<input type="button" value="add record"/> <input type="button" value="Back"/> <input type="button" value="Help"/>						
Respondent Name	City	State	Contact Name	Contact Phone	Contact Email	Action
						<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
Baltimore City Police						<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
1st Class Moving Storage	Elkridge	MD				<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
1st Team Staffing Services, Inc.	Baltimore	MD	Shelley Sovero	410-242-2810		<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
2 Tor, Inc. d/b/a 2U	Landover	MD	Erin Anderson	301-892-4350		<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
2nd Ave Value Stores	Laurel	MD				<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
6k Systems, Inc	Reaston	VA				<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
A & G Management	Glen Burnie	MD				<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
A-K Real Estate & S-K Properties & Inves	Gatthersburg	MD				<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
A.E.X. Group	Aston	PA		484-768-1249		<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
Abilities Network	Towson	MD				<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
Academy Art Museum	Easton	MD	Erik Neil	410-822-2787	eneil@academyartmuseus.org	<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
Actionlink, LLC	Bowie	MD				<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
Active Network	Frostburg	MD	Jessica Swick	301-687-8197		<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
Adams & Associates, Inc.	Woodstock	MD				<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
Admiral Security Service	Baltimore	MD				<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>
Advantage Surveillance, Inc.	Towson	MD		888-696-3669		<input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Show Activity"/>

When clicking the View Respondents button on the Case Load Screen, the above screen will be shown. Using this screen, respondents may be added, modified or viewed. Be sure to check the list to see if a respondent exists before adding them as new. By clicking on the Show Activity button you can see what cases this respondent has been involved with.

When adding a respondent, you will see this screen.

Edit Record 

Respondent Name:

Walmart store #2435

Address 1:

2399 North Point Blvd

Address 2:

City:

Dundalk

State:

MD

Zip:

21222

County:

Baltimore ▼

Contact Name:

Title:

Contact Phone:

410-284-5412

Contact Email:

Contact Add 1:

Contact Add 2:

Contact City:

Contact State:

Contact Zip:

Contact County:

▼

Notes:

Save

Help

Cancel

Be careful when adding respondents not to duplicate names unless necessary. Notice in the example below, There are two entries for Walmart store #2435 and two entries for Washington County Government.

Walmart store #2435	Dundalk	MD		410-284-5412		Modify	Delete	Show Activity
Walmart store #2435	Dundalk	MD		410-284-5412		Modify	Delete	Show Activity
Walmart-1860	Elkton	MD		410-398-1070		Modify	Delete	Show Activity
Washington County Government						Modify	Delete	Show Activity
Washington County Government						Modify	Delete	Show Activity
Washington County Health Department	Hagerstown	MD	Carol Kane	240-313-3200		Modify	Delete	Show Activity
Washington County Public Schools	Hagerstown	MD		301-766-2800		Modify	Delete	Show Activity
Waste Management Inc.	Baltimore	MD		410-488-2093		Modify	Delete	Show Activity
Waste Management, Inc.	Elkridge	MD	Michele H. Molly	215-269-2188		Modify	Delete	Show Activity

Case Detail Screen

Edit Case

ID:	40	Initial Entry by:	nicole.brooks1	on	2014-05-29 11:23:14	Last Updated by:	nicole.brooks1	on	2014-06-11 16:28:50
-----	----	-------------------	----------------	----	---------------------	------------------	----------------	----	---------------------

Office Date	05/22/2014	Violation Date	02/22/2014	MOCR#		Case Type	Employment
FY	2014	Violation Occurred in	Baltimore	EEOC#	531-2014-00918	Referral Type	Mail
Date Authorized		Case Status	Open	HUD#		Function	Enforcement
						Unit	2

Current Assignment: Hernandez, Bonnie as of 06/04/2014 Last Action: Assign Case Action Date: 06/04/2014

Basis

Retaliation

Race: American Indian/Alaska Native, Asian, Bi-Racial/Multi-Racial, Black/African American

Sex: Female, Male, Transgender

Religion: 7th Day Adventist, Catholic, Jewish, Muslim

National Origin, Age, Marital Status

Hint: hold down the Ctrl key to select multiple items or uncheck items.

Issues

Discharge

Issues: Accessibility, Assignment, Constructive Discharge, Demotion

Housing

Hint: hold down the Ctrl key to select multiple items or uncheck items.

CP

Last Name: Gross First Name: Rodney

Middle Name: C Salutation: Mr

Address Line 1: 4600 Owings Run Road

Address Line 2: Apt. 303

City: Owings Mills State: MD

Zip: 21117 County: Baltimore

Home Phone: Cell Phone: 410-790-1457

Email: RNBGROSS731@verizon.

Agree to: None Reason:

Representative: Search

RP

Respondent Name: QSI/Nextgen Practice Solutions Details Search

Respondent Address: 11350 McCormick RD Hunt Valley, MD 21031

Contact Name: Title:

Contact Phone: Contact Email:

Address Line 1:

Address Line 2:

City: State:

Zip: County:

Agree to: None Reason:

Representative: Jackson Lewis P.C. Details Search

Actions FFC Mediation Attachments Save Notes Close Print Documents Help History

Once you have selected a case to work with, the Case Detail Screen will be opened. This screen has several sections.

Green Information Bar - This line is not editable. It shows the case ID#, who initially entered the case and when and who last saved changes to the main case information and when.

Case Identifier Section - Shows the filing dates associated with the case, the number, case type and the Case Status. Note: The case status is updated via action codes.

Blue Information Bar - This shows who is assigned to the case and the last action applied to the case.

Basis / Issues - Basis and Issues are grouped within each category. Multiple of each may be selected. Hold the CTRL key and click all desired.

CP Box - All of the Complainant's demographic information. If they have a Representative, click the Search button to access the Master List.

RP Box - All of the Respondent's demographic information. The respondents are located in a separate listing. To access, click the Search button. After selecting or adding the desired RP, the system will ask if you would like to copy the contact information. If yes then the contact fields will be populated on the main case screen. It is important to have the proper contact information as this is where the Document Manager gets the information for the RP documents.

Actions Button

The screenshot shows a web interface with a top navigation bar containing buttons: Actions, FFC, Mediation, Attachments, Save, Notes, Close, Print, Documents, Help, and History. Below this is a search bar with fields for 'Agree to' (None), 'Reason', and 'Representative', and a 'Search' button. The main content area is titled 'Actions' and contains a table with the following data:

Action Date	Action Taken	Assigned To	Remove	Action
05/27/2014	Open Case	Witte, R. Keith	<input type="checkbox"/>	<button>Modify</button> <button>Delete</button>
05/27/2014	Assign Case	Moran, Lindsey	<input type="checkbox"/>	<button>Modify</button> <button>Delete</button>
10/07/2014	Assign Case	Keefer, Paulette	<input type="checkbox"/>	<button>Modify</button> <button>Delete</button>

At the bottom right of the 'Actions' panel are buttons for 'Add', 'Help', and 'Close'.

After the case has been established, the buttons are available for use. Click on the Actions Button to see what Actions have been added to the case and to add additional Actions. Please note, Actions may **not** be deleted. In order to remove an action, check the box in the Remove column.

To add an Action, click the Add button.

The screenshot shows a form titled 'Actions' with a blue header. It contains two input fields: 'Action Date' with the value '11/12/2014' and 'Action Taken' with a dropdown menu showing 'Select Action Taken'. At the bottom right are buttons for 'Save', 'Help', and 'Cancel'.

By pulling down the Action Taken field, you will be presented with all of the Actions available. The screen will dynamically change if additional information is needed for a selected Action.

FFC Button

Agree to <input type="text" value="None"/> Reason <input type="text" value=""/>	Agree to <input type="text" value="None"/> Reason <input type="text" value=""/>
Representative <input type="text" value=""/> <input type="button" value="Search"/>	Representative <input type="text" value=""/> <input type="button" value="Search"/>

Actions **FFC** Mediation Attachments Save Notes Close Print Documents Help History

FFC ✕

Date FFC Scheduled	<input type="text" value=""/>
CP Representative	<input type="text" value=""/> <input type="button" value="Search"/>
RP Representative	<input type="text" value=""/> <input type="button" value="Search"/>
Date of FFC	<input type="text" value=""/>
Investigator Assigned	<input type="text" value="Investigator Name"/>
Monetary Award	<input type="text" value="0.00"/>
Resolution	<input type="checkbox"/> Administrative Closure <input type="checkbox"/> CP Withdrawal <input type="checkbox"/> Investigation Continued <input type="checkbox"/> PDS Agreement <input type="checkbox"/> Policy Change <input type="checkbox"/> Private Agreement <input type="checkbox"/> Promotion <input type="checkbox"/> Training
Benefits	<input type="checkbox"/> Apology <input type="checkbox"/> Neutral Reference <input type="checkbox"/> No Further Action To Contest <input type="checkbox"/> Reinstatement <input type="checkbox"/> Unemployment Benefits

The FFC button screen can be completed as information becomes available. The system allows for separate Representatives to be assigned for the FFC. If they are the same as the main case they still have to be added here.

Mediation Button

The screenshot displays a web application interface. At the top, there is a navigation bar with a search section on the left and a series of buttons on the right. The search section includes two identical blocks, each with 'Agree to' (None), 'Reason' (dropdown), and 'Representative' (text input) fields, followed by a 'Search' button. The button bar contains 'Actions', 'FFC', 'Mediation' (highlighted in yellow), 'Attachments', 'Save', 'Notes', 'Close', 'Print', 'Documents', 'Help', and 'History'.

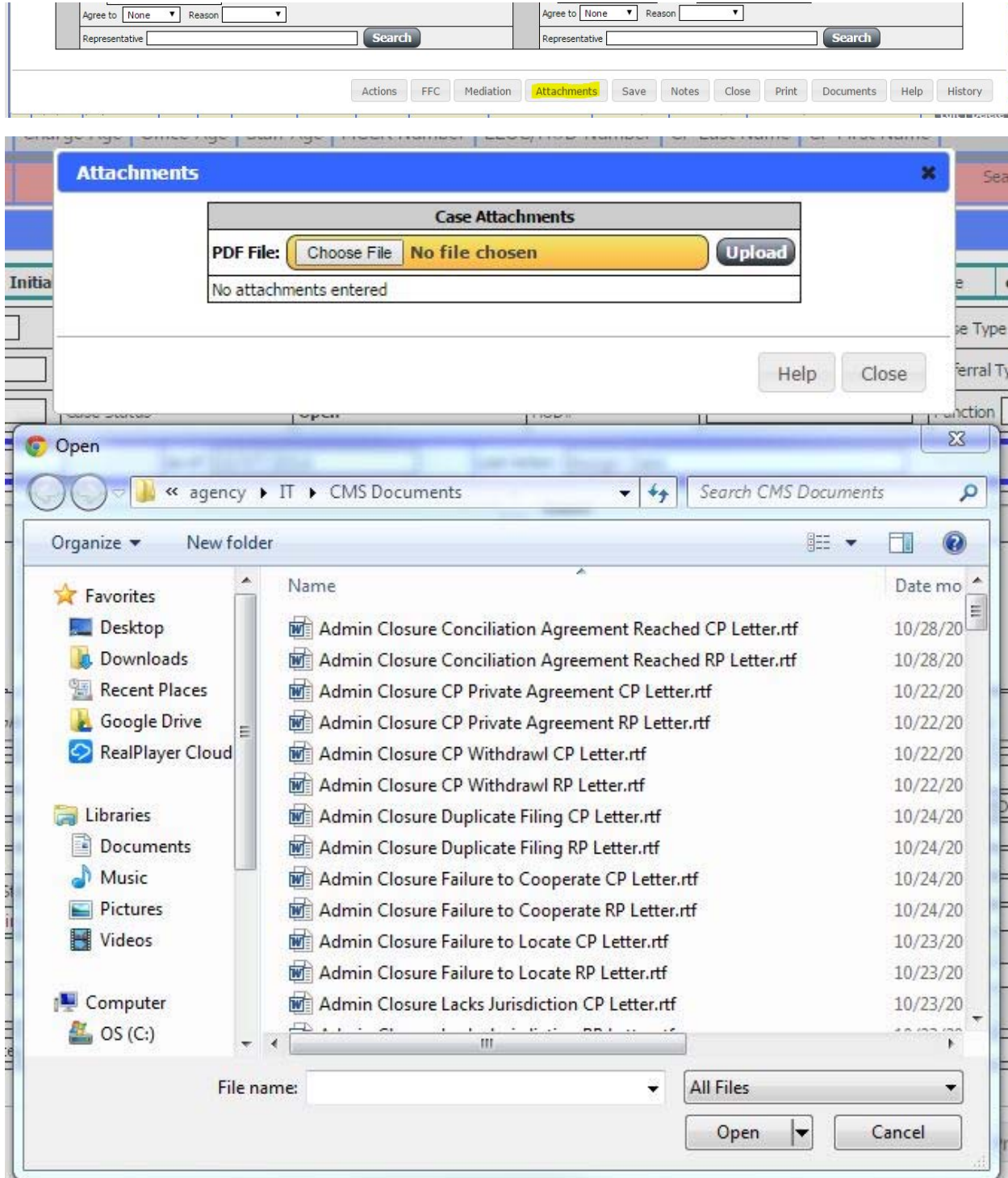
Below the navigation bar is a 'Mediation' form window with a blue header and a close button. The form contains the following fields:

- Mediation Date:** Text input field.
- First Mediator:** Text input field with a 'Search' button.
- Second Mediator:** Text input field with a 'Search' button.
- Location:** Dropdown menu with 'Select' as the current value.
- Cash Award:** Text input field.
- Remedy:** A list of checkboxes:
 - ☐ Administrative Closure
 - ☐ CP Withdrawl
 - ☐ Mediation Continued
 - ☐ Mediation Failed
 - ☐ PDS Agreement
 - ☐ Private Agreement
 - ☐ Mediation Scheduled

At the bottom right of the form window are 'Save', 'Help', and 'Cancel' buttons.

Shown above is a detail record for the Mediation button. As information is known, enter it accordingly. The Mediators to be listed must appear in the Mediator List. They can be added if they do not exist. The system can store multiple mediations.

Attachments Button



Clicking the Attachments Button will open a window listing all files attached to the case. For example, a Position Statement that is part of the file can be scanned at included in the electronic case documentation. Files of any type and size are allowed however please use discretion when uploading large files.

Notes Button

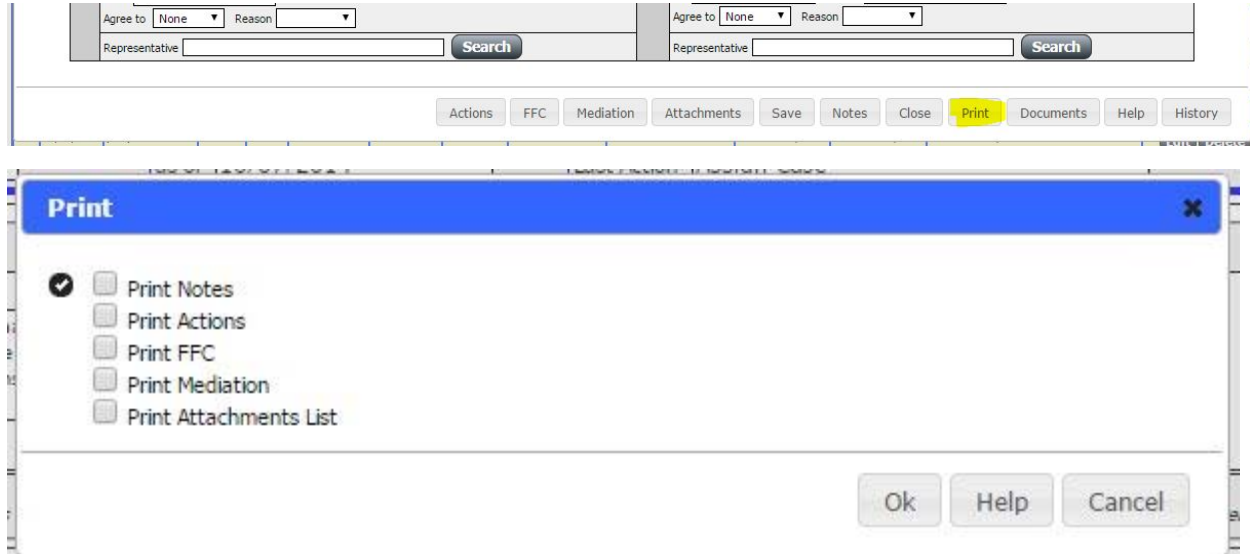
The screenshot displays a software interface with a menu bar at the top. The menu bar includes buttons for 'Actions', 'FFC', 'Mediation', 'Attachments', 'Save', 'Notes' (highlighted in yellow), 'Close', 'Print', 'Documents', 'Help', and 'History'. Below the menu bar, there are two identical search forms. Each form has fields for 'Agree to' (set to 'None'), 'Reason', and 'Representative', followed by a 'Search' button.

The 'Notes' window is open, showing a table of notes. The table has columns for 'Date', 'Tab', 'Sub', 'Staff', and 'Subject'. The first row contains the data: '11/12/2014 2:02PM', 'A', '1', 'keith.witte', and 'This is a test note'. To the right of the 'Subject' column are 'View' and 'Delete' buttons. Below the table, it says 'Page: 1'. At the bottom of the window are 'Add', 'Help', and 'Close' buttons.

The 'Save Note' window is also open, showing a form to create a new note. It has fields for 'Subject' (containing 'This is a test note'), 'Tab' (set to 'A'), and 'Sub' (set to '1'). Below these is a large text area for the 'Note' body, containing the text: 'This is the body of the note. Here, you can use simple word-processing keys to enter the text of the note. The text can even be split into paragraphs if you wish.' At the bottom of the window are 'Add', 'Help', and 'Cancel' buttons.

Clicking the Notes Button will open a window listing all notes attached to the case. The notes are listed in chronological order. On the note detail screen, use of the Tab and Sub are optional. The thought behind Tab and Sub would be to correspond to the physical case file. The Note body has basic word processing edit features or can be pasted to (using a Ctrl-V) from an outside copy.

Print Button



Clicking the Print Button will open a window listing all components of the case that can be printed. The main case information will always be included along with the items that are checked. A print preview will be presented before printing to paper.

Document Manager

The screenshot shows the top section of the Document Manager interface. It features two identical search filter panels side-by-side. Each panel contains a dropdown menu for 'Agree to' (set to 'None'), a dropdown for 'Reason', and a text input for 'Representative'. Below these is a 'Search' button. Below the search panels is a horizontal toolbar with buttons for 'Actions', 'FFC', 'Mediation', 'Attachments', 'Save', 'Notes', 'Close', 'Print', 'Documents' (highlighted in yellow), 'Help', and 'History'.

By clicking on the Documents button, you will be presented with the document selector screen.

The screenshot shows the 'Documents' selector window. It has a blue title bar with the text 'Documents' and a close button. The main area contains two dropdown menus: 'Category:' with the value '-=Select=-' and 'Document:' with the value '-=Select=-'. At the bottom right, there are three buttons: 'Create', 'Help', and 'Close'.

All documents are categorized. Click the Category pulldown to select a desired category. Then, select the desired document. If the document requires additional information, the appropriate information will be prompted for.

This screenshot shows the 'Documents' selector window with the following fields populated: 'Category:' is set to 'General Investigation Forms', 'Document:' is set to 'Contact Letter', 'Day of Week?' is 'Wednesday', 'Contact Date?' is 'November 12, 2014', 'Time?' is '1 pm', and 'Phone Number to call?' is '410-555-1212'. The 'Create', 'Help', and 'Close' buttons are still present at the bottom right.

After clicking the Create button, the letter will be generated and be shown ready for download as seen below. Open the document.

The screenshot shows a web application interface for creating a document. The 'Documents' window is open, displaying a form for 'General Investigation Forms'. The 'Document' dropdown is set to 'Contact Letter'. The 'Day of Week' is 'Wednesday', 'Contact Date' is 'November 12, 2014', 'Time' is '1 pm', and 'Phone Number to call' is '410-555-1212'. The 'Create' button is visible. Below the form, there are tabs for 'Actions', 'FFC', 'Mediation', 'Attachments', 'Save', 'Notes', 'Close', 'Print', 'Documents', 'Help', and 'History'. The 'Contact Letter' document is shown in the bottom left corner.

November 12, 2014

Mr. Allen Jones
6120 Gothic Lane
Bowie, MD 20720

RE: Allen Jones vs. Sears Roebuck & Co.- Annapolis
MCCR: EEOC: 531-2013-01931

Dear Mr. Jones:

The above-named charge of discrimination has recently been assigned to me for investigation and resolution.

Efforts to reach you at the telephone numbers, that you provided to this agency at the time you initiated this charge, have been unsuccessful; therefore, I am requesting that you contact me on or before **Wednesday, November 12, 2014, at 1 pm**

You may reach me by calling **410-555-1212**. I am available Monday – Friday during the hours of 9:00a – 5:30p. If I am unavailable at the time that you call, please leave a number where you may be reached during the day or evening hours. If I do not hear from you by **Wednesday, November 12, 2014** this case may be administratively closed or brought to a conclusion based solely on the information that is currently in the file.

NOTE: You are responsible for keeping this agency notified of any changes of address or telephone numbers. The inability to contact you will be construed as a failure on your part to cooperate with the investigation and may result in the closure of your file.

Sincerely,

Paulette Keefer
Civil Rights Officer
410-555-1212

Press Ctrl-A to select all the text. From the Staff Portal, open a blank copy of letterhead. Underneath of the header block, right-click and select **MERGE FORMATTING (M)**. Your document is now ready to print and/or save.

Reports

Case Management System Reports

Logged in as: keith.witte

Saved Reports

- ABORTED CASES - FISCAL YEAR [view] [edit] [copy] [delete]
- ABORTED CASES - FISCAL YEAR2 [view] [edit] [copy] [delete]
- CASE LOAD - ALL OPEN [view] [edit] [copy] [delete]
- CASE LOAD REPORT BY STAFF [view] [edit] [copy] [delete]
- CHARGE AGE [view] [edit] [copy] [delete]
- CHARGE AGE > 90 [view] [edit] [copy] [delete]
- CLOSURE REPORT [view] [edit] [copy] [delete]
- COUNT ALL CASES [view] [edit] [copy] [delete]
- FFC MONETARY REPORT [view] [edit] [copy] [delete]
- FISCAL YEAR [view] [edit] [copy] [delete]
- MEDIATION CASH REWARDS [view] [edit] [copy] [delete]
- PHIL REPORT [view] [edit] [copy] [delete]
- RKW PLAY [view] [edit] [copy] [delete]
- TEST2 [view] [edit] [copy] [delete]
- TEST3 [view] [edit] [copy] [delete]
- THRESHOLD TEST - E/C [view] [edit] [copy] [delete]
- THRESHOLD TEST - E/S [view] [edit] [copy] [delete]
- THRESHOLD TEST - P/C [view] [edit] [copy] [delete]
- THRESHOLD TEST - P/S [view] [edit] [copy] [delete]
- THRESHOLD TEST = H/C [view] [edit] [copy] [delete]
- [New]

☐ Distinct ☐ Count ☐ Group

FIELDS

☐ Master Record Fields

☐ Basis Fields

☐ Issues Fields

☐ Benefits Fields

☐ Resolution Fields

☐ Respondent Fields

☐ Representative Fields

☐ Action Fields

☐ Mediation Fields

☐ Mediation Remedy Fields

☐ Mediator Fields

☐ Attachments

CONDITIONS -

Add Condition

=

ORDER -

Add Order

ASC

Save Report

Print Report

Show SQL

Back to Main Menu

The reporting facility in CMS is very robust. If you are in the need of a report, see one of the CMS support staff to discuss.

